

# PlanoGraphics™ 3.5



Macintosh



# PlanoGraphics 3.5

## User Guide

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*by Mediatronic Systems*

*PlanoGraphics 3.5 sets a new standard for affordable planogramming software and goes one step further than traditional planogramming software. With advanced graphics features like composite imaging, automated planogramming, wizards that guide you through making planograms and product catalogs and access to virtually any database file format PlanoGraphics gives you superior results at a fraction of the price of any other planogramming software package.*

# PlanoGraphics 3.5 User Guide

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Printed: June 2007 in Munich, Germany

## **Publisher**

*Mediatronic Systems*

## **Managing Editor**

*Palms*

## **Technical Editors**

*Mike McCullough*

## **Cover Design**

*Global Graphics*

## **Special thanks to:**

*Beata Pawlak, Julia Ann and the whole MAC PlanoGraphics team.*

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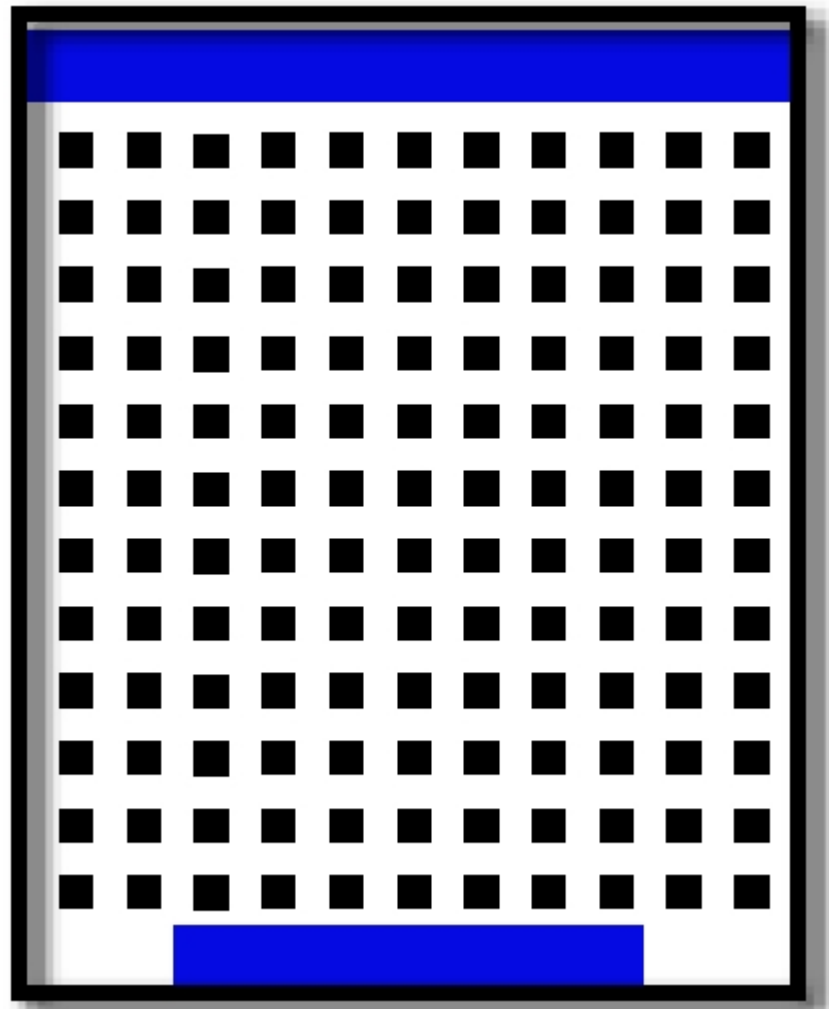
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# PlanoGraphics™ 3.5



Part

I

Introduction

# 1 Introduction



## 1.1 Overview

# PlanoGraphics™ 3.5

PlanoGraphics is the affordable picture based planogram program that lets you share your picture perfect planograms in a variety of formats.

PlanoGraphics 3.5 sets a new standard for affordable planogramming software and goes one step further than traditional planogramming software. With advanced graphics features like composite imaging, automated planogramming, PlanoGraphics gives you superior results at a fraction of the price of any other planogramming software package.

The making of a planogram in PlanoGraphics is a three step process :

- 1) Add or Import product data.
- 2) Link product images  to your product data.
- 3) Create a new planogram  document and add products to the planogram from your product database.

The product database creation and image linking process is only required once. After you have done the first 2 steps above you can reuse the same product data for all your planograms.

The product database is much like a spreadsheet with rows and columns. Each product entry in the catalog corresponds to a row in your catalog file. Each column in your catalog represents a product attribute like the product name, description, size, etc. Each product entry in a catalog has a picture name attribute, which is a link or reference to the location of a product picture file. This file is a separate from the catalog.

Once you have a product database made you can start making a planogram. You build your planogram by browsing through your product data and adding the products you want on your display wall. You move your products around on the display by simply clicking on a product and dragging to the position you want. Once you have finished your display you can save it, export it or print it. The first step in making a planogram of your products is to make a product catalog.

PlanoGraphics can also build your display for you automatically. Just check off the products in your product catalog that you want in your display, set the builder options and then click on the "Build Display" button. PlanoGraphics then automatically builds your display for you in usually 10 seconds or less.

PlanoGraphics can also build "smart planograms" for you. PlanoGraphics can filter and analyze information about each product you have in your catalog or data source and figure out the smartest way to place them in your display automatically allowing you to prototype dozens of planograms in a matter of minutes.

## 1.2 What's New in version 3.5

**PlanoGraphics 3.5 continues to set the standard for affordable planogramming software with several new features that will help you make better looking planograms faster.**

**Automated Updates** - PlanoGraphics automatically checks for and informs you when new updates are available. Downloading new updates now requires just a single step, single click on the INSTALL UPDATE button. PlanoGraphics then automatically downloads your updates. Once downloaded just drag the PlanoGraphics update folder to your Applications folder.

**Super Selector Search Filter** - Search for a specific product or a range of products based on any of your product data attributes like ProductNr, Description, Category, Brand, Width, Height, Depth or EAN / UPC numbers. Products that don't match your search criteria are filtered out of the product list in the selector, making it easier and faster to work with the product you need.

**Nudge** - Single products groups can be nudged using the arrow keys for fine control and placement.

**Delete Key** - Products can now be deleted using the delete key in addition to using menu commands.

**Duplicate** - Products in your planogram can be quickly duplicated by using the Apple-D key combination or EDIT >> DUPLICATE in the main menu.

**Numeric Positioning** - Single products and product groups can be positioned to an exact X, Y position by entering inch or centimeter values in the X, Y position panel in the upper left corner in the main program window.

**Two New Catalog Column Types** - A Brand column and Category column are available are included in the default product catalog.

**More Placement Box Color Choices** - Previous versions of PlanoGraphics automatically colored product placement boxes based on the product's size. Now PlanoGraphics lets you select the method of coloring based on, size, product category, product brand, black & white wire frame or assign your own custom color.

**Load Product List Feature** - This feature allows you to load a list of products to your planogram from a text file. When you load a list of product part numbers from a text file, PlanoGraphics automatically searches for the products in your product catalog or database and adds either a single product or one or more rows of the product to your planogram. You can then try other planogram configurations for the loaded product list by changing options under the Builder tab in the selector or manually fine tune the planogram by repositioning items with the mouse pointer.

**More Tags** - Three new tags are available, category, brand and custom text. The custom text tag lets you add any custom text to the tag.

**New Database Engine** - Up to 10x increase in total program performance. More powerful search features, easier to edit database.

**Settings Saved with Planogram** - Most document settings like which tags are turned, picture or placement box mode are now saved with the planogram document, saving you from having to reset these settings for a particular planogram document every time you restart the program.

**Recent Document History** - The location of the last 5 documents that you worked on are saved can be accessed through Welcome Window, giving you fast access to the most popular planogram documents.

Rulers - Fully customizable rulers, including, font, font size, font color and ruler colors

High resolution printing - PlanoGraphics now dynamically sets the printing resolution to match your printer's output resolution, resulting in super crisp high quality prints.

Adjustable export resolution - Set the export resolution of your planograms from 72 to 750 dpi giving you super crisp exported planograms which can be used for web, presentations or high end offset printing.

## 1.3 Product Registration

Once your demo period has expired after 30 days you will need to purchase a registration number to continue to use the program. You can purchase a registration number by visiting [www.planographics.com](http://www.planographics.com).

Once a registration number is purchased you can enter the registration number by clicking on REGISTRATION in the Apple or PlanoGraphics-X menu. Enter your name and registration number and company name (if any) in the registration dialog box.

## 1.4 System Requirements

PlanoGraphics for Macintosh is available in two versions. One version is targeted for Mac OS 8.5 to Mac OS 9 and another version PlanoGraphics-X for all versions of MAC OS X. System requirements differ slightly for each version:


Mac OS 8.5 to Mac OS 9 - G3 300Mhz or faster, 5MB Hard disk space for program files. Additional space needed for product pictures and product data. Amount of space needed depends on the number of products in your product database, 5MB of RAM, Mouse.

Mac OS X 10.1 or higher - Power PC, G4 400Mhz or faster, 5MB Hard disk space. Additional space needed for product pictures and product data, 50MB of RAM, Mouse.

Macs with Intel processors: A Universal Binary version of PlanoGraphics is currently under development and will be released in a future update.

## 1.5 Upgrading or using files from a different version

If you are upgrading from a previous version of PlanoGraphics for the Mac or if you are migrating or sharing files from the Windows version of PlanoGraphics you will have to convert the product data before you can use it in this version of PlanoGraphics.

To get your data into this version you will need to export the product data from the catalog manager to a tab delimited text file and then import the data from the text file into this version of PlanoGraphics. See the section on importing for more information on how to import .

Next, copy or move all your product images to the "Catalogs" folder located in the planographics

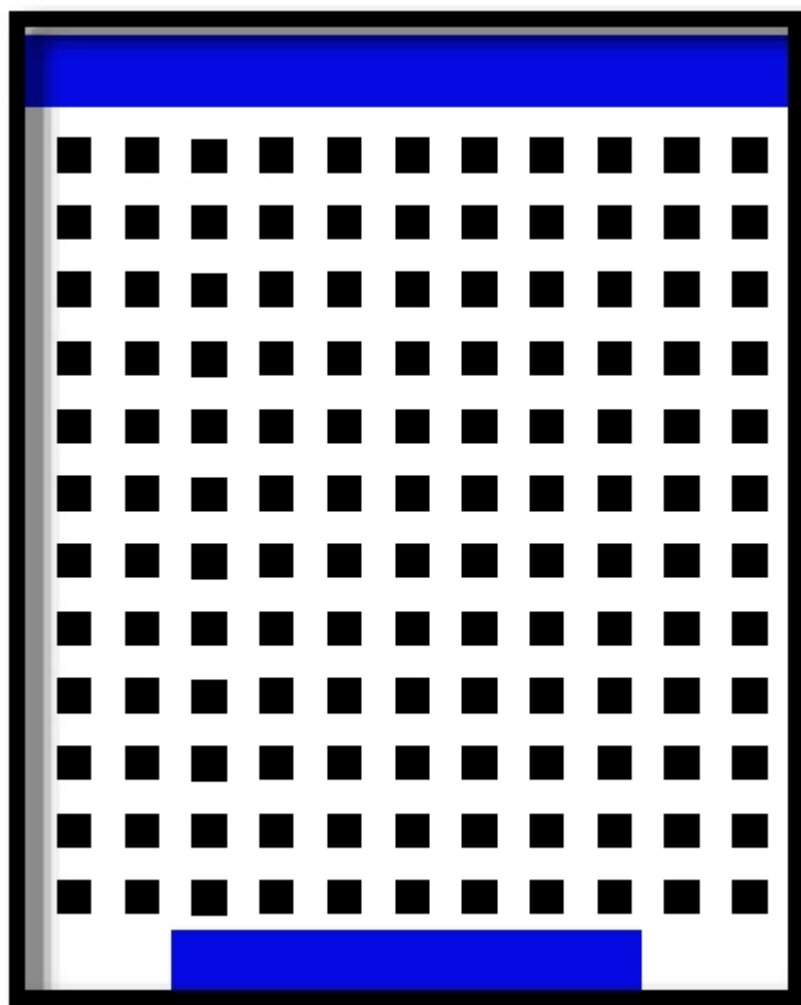
application folder.

After you have migrated your product data and images to this version of the program you can open your existing planogram files. The first time you open your planogram files you may get a warning that the catalog file or database associated with the planogram can not be found and that planographics will attempt to open the planogram with the default catalog file. Click OK to continue. The planogram file should open successfully if you have followed the steps above.

Please note that any features saved in the file that are not supported by this version of the program will be ignored and will be lost when you re-save the file. Therefore if you plan to continue to use the same planogram file with a different version of PlanoGraphics (like the Windows version) you should keep a copy of the original file for use with the other version of PlanoGraphics.



# PlanoGraphics™ 3.5



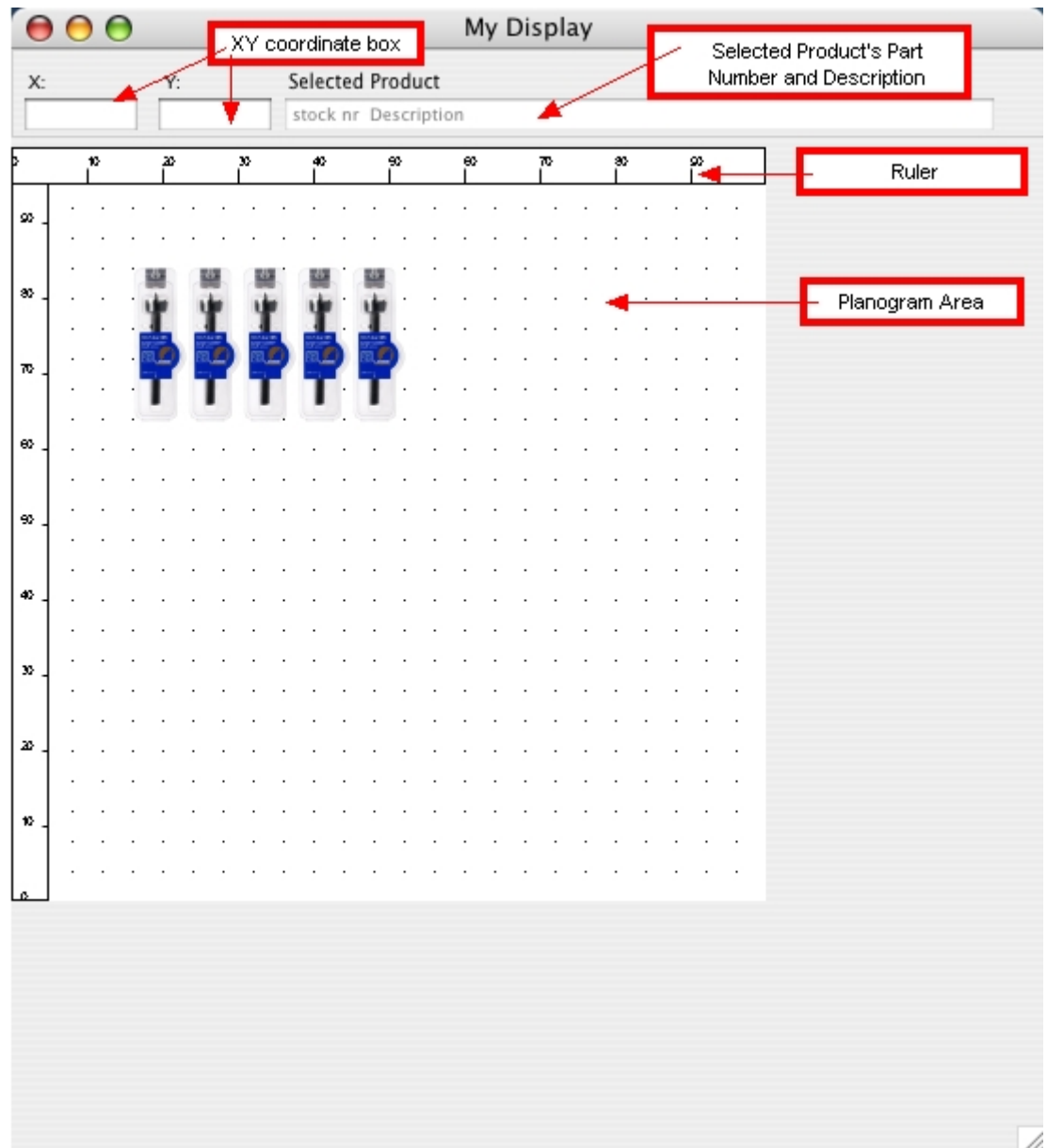
Part



User Interface

## 2 User Interface

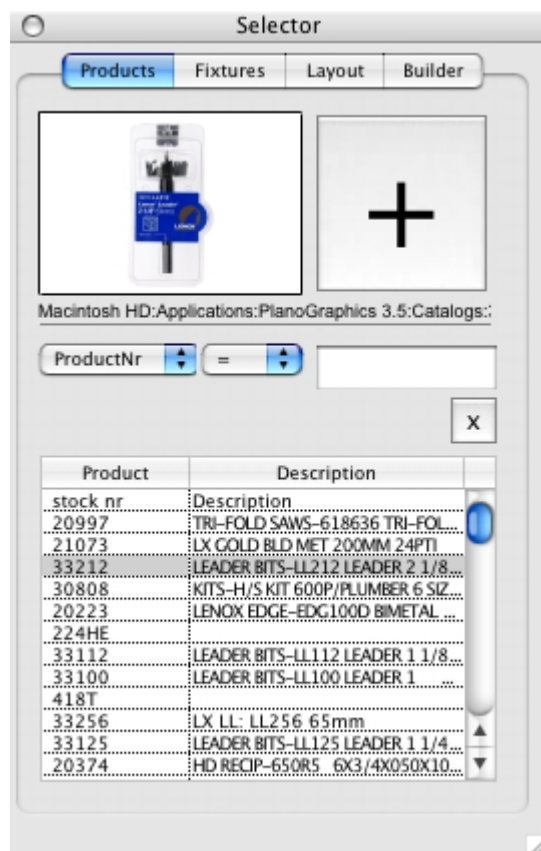
### 2.1 Main Work Space



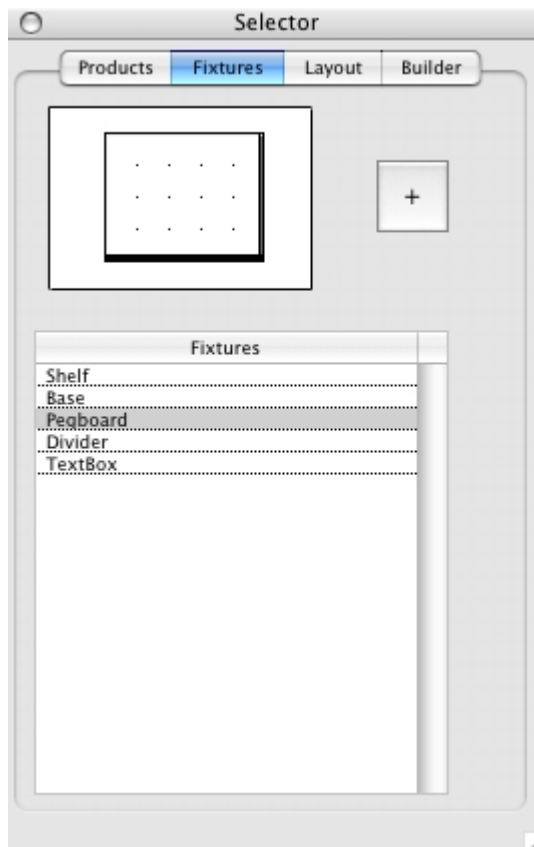


## 2.2 Selector

1) The Products Tab is used to find, preview and add products to your planogram or the Builder List.



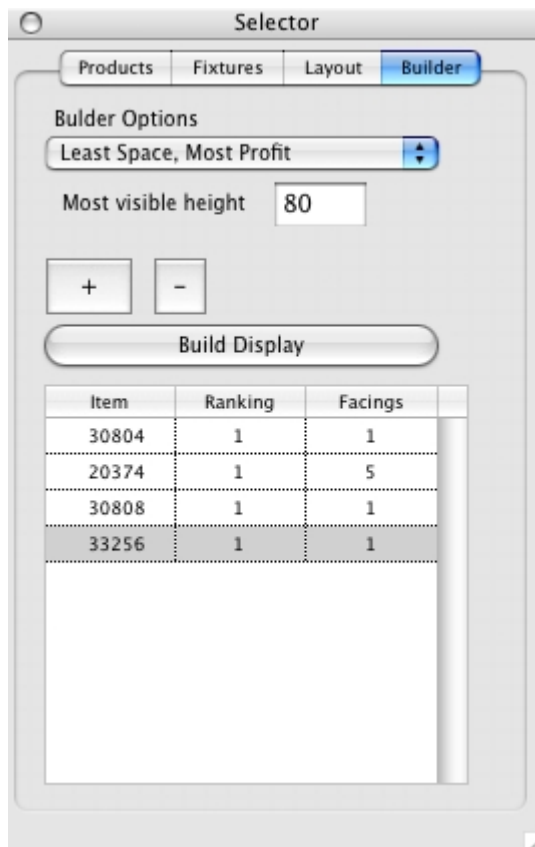
2) The Fixture Tab is used to add new fixtures.



**3) The Layout Tab shows you a thumbnail images of your complete planogram along with a list of all the items in your planogram.**



**4) The Builder Tab lists all the items that will be added automatically to your planogram along with options on how the items should be ranked and added.**



## 2.3 File Menu

**New** - Creates a new planogram document. (more info <sup>32</sup>)

**Open** - Opens a new planogram document.

**Open Recent** - Lists shortcuts to the five most recently opened planogram documents.

**Load Product List** - Creates a planogram based on a list of product numbers in a text file.

**Save** - Saves the active planogram document. (more info <sup>45</sup>)

**Save As** - Saves the existing planogram document under a new name.

**Check for PlanoGraphics Update** - Checks for new updates and alerts you to new program updates.

**Export** - Allows you to take a "snap shot" of your planogram and save it as a TIFF, BMP or JPG file. (more info <sup>50</sup>)

**Print Setup** - Allows you to change the printer used by PlanoGraphics and the printer's configuration.

**Print** - Prints the current planogram. (more info <sup>51</sup>)

**Quit** - Quits the program.

## 2.4 Edit Menu

**Cut** - Cuts the selected item in your planogram to the clip board.

**Copy** - Copies the selected item in your planogram to the clip board.

**Paste** - Pastes the item from the clip board to the planogram display.

**Duplicate** - Duplicates the selected product in you planogram.

**Delete** - Deletes the selected product in you planogram.

**Copy Wall** - Copies the whole planogram to the clipboard, allowing to paste the whole planogram into another program.


**Options** - Lets you change program options like unit of measurement. (See Program Options section more info)


## 2.5 Product Menu

**Delete** - Deletes the selected item in your planogram.

**Select Next** - Selects the next item in your planogram. Items are selected in the order they were added.

**Select Previous** - Selects the previous item in your planogram. Items are selected in the order they were added.

**Product Details** - Shows basic details of the selected item in your planogram. It also allows you to change the peg hook depth for the selected item. (more info) 

**Add Fixture** - Adds the fixture set to be added in the Selector under the Fixtures Tab. (more info) 

## 2.6 Database Menu

**Edit** - Opens the database for editing.

**Import** - Opens the database for editing importing.

**Rebuild database** - Opens rebuild options for database

## 2.7 View Menu

**Reports** - Opens the report writer

**Selector** - Makes the Selector visible.

**Zoom** - Allows you to set the zoom view of the planogram from 10% to 100% .

**Windows** - Allows you to arrange all open planogram documents in the program's work space.

**Mode** - Allows you to set the way products are displayed in your planogram. You can display product pictures or placement boxes. Placement box color options are available under this menu. (more info) <sup>46</sup>

**Tag** - Enables Tags to be displayed with the products in your planogram. The tags display extra information about each product in your planogram. (more info) <sup>45</sup>

**Product Transparency** - Enables or disables background areas of product pictures to appear transparent when added to your planogram.

**Rulers** - allows you to turn on or off the rulers or set the ruler options

## 2.8 Rulers

You can add or remove rulers to your planogram. The rulers have several options which effect how they are displayed on screen and when you print your planograms.

**ON / OFF** - This will make the rulers visible or invisible.

**FONT** -This changes the font used in the ruler

**BACKGROUND COLOR**- This changes the background color used to fill the ruler area

**SEND TO FRONT / SEND TO BACK** - This setting will make the ruler either appear over your products in the planogram or below on he background layer of the planogram.

## 2.9 Database Manager

Use the Database Manager to create and manage the product data used in PlanoGraphics.

Product Database

ProductNr  =  X

Product	Description
stock nr	Description
20997	TRI-FOLD SAWS-618636 TRI-FOLD W/...
21073	LX GOLD BLD MET 200MM 24PTI
33212	LEADER BITS-LL212 LEADER 2 1/8 54
30808	KITS-H/S KIT 600P/PLUMBER 6 SIZES --
20223	LENOX EDGE-EDG100D BIMETAL UTILI
224HE	
33112	LEADER BITS-LL112 LEADER 1 1/8 29
33100	LEADER BITS-LL100 LEADER 1 25M...
418T	
33256	LX LL- LL256 65mm
33125	LEADER BITS-LL125 LEADER 1 1/4 32
20374	HD RECIP-650RS 6X3/4X050X10/14...
33175	LEADER BITS-LL175 LEADER 1 3/4 44
33150	LEADER BITS-LL150 LEADER 1 1/2 38...
30887	VARI-BITS-VB-7 VARIBIT 1/PK
424T	
23834	CT HOLE CUTTER-17CHC 27MM
30886	VARI-BITS-VB-6 VARIBIT 1/PK
30001	ACCESSORIES-1L ARBOR BOXED-1L
20299	JIG SAW-CF320SC 3 X 3/16X20 5/CA...
20116	HACKSAW-218HE 12 X1/2X023X18 1...
20143	HACKSAW-V214HE 12 X1/2X023X14 ...
20306	JIG SAW-BT410S 4 1/2X3/8X050X10 2...
20305	JIG SAW-BT406S 4 1/2X3/8X050X6 2/...
30211	CT H/S-11CT 11/16 17MM 1/BX
30232	CT H/S-32CT 2 51MM 1/BX -32
20556	RECIPS-676RC 6X7/16X050X6 5/PK...
20183	LX LRB- 25PK 12110R 300mm 10TP
20981	""PVC BLADES-18"" REPLACEMENT BL
20482	E-RECIP-110ER 11 3/4X1X035X10/14...

Product Number

Description

Picture

Width

Height

Depth

EAN / UPC

Cost Price

Retail Price

Brand

Category

Save Changes To Record

Import Delete Export

Add New Record

Close

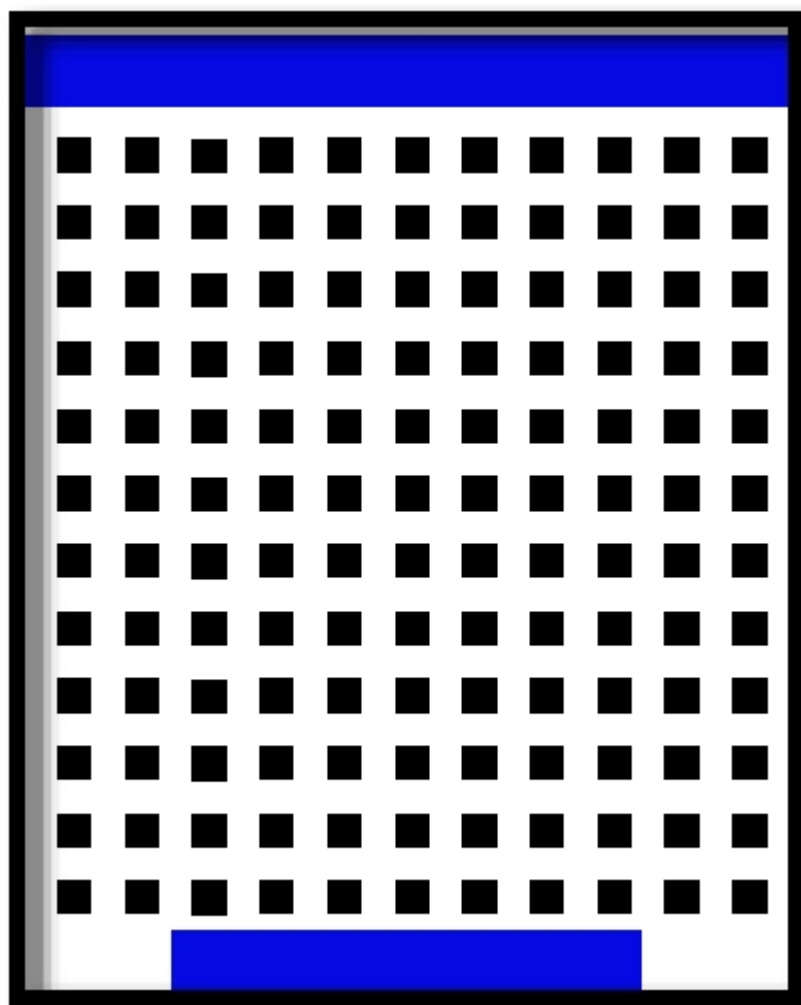
Data browser button

Unit Of Measurement





# PlanoGraphics™ 3.5



Part



Product Data

### 3 Product Data

#### 3.1 Overview

The screenshot shows the Product Database Manager interface. Red boxes and arrows highlight the following components:

- Product Search:** A search bar at the top left with a 'ProductNr' label and a search icon.
- Product List:** A table listing products with columns 'Product' and 'Description'. The selected product is '33112 LEADER BITS-LL112 LEADER 11/8 20...'. A red box labeled 'Data for selected product in product list' points to the selected row.
- Controls:** A section at the bottom left containing a 'Data browser button' with navigation icons and a 'Unit Of Measurement' dropdown set to 'cm'.
- Control Buttons:** A section at the bottom right containing buttons for 'Import', 'Delete', 'Export', 'Add New Record', and 'Close'.

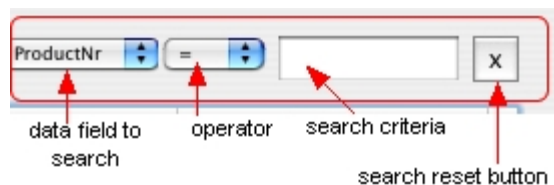
The right side of the interface shows the details for the selected product (33112):

- Product Number:** 33112
- Description:** LEADER BITS-LL112 L
- Picture:** 33112 205X70.tif
- Width:** 7,0
- Height:** 20,5
- Depth:** 0,0
- EAN / UPC:**
- Cost Price:** 0,00
- Retail Price:** 0,00
- Brand:** Lenox
- Category:**

At the bottom right, there is a 'Save Changes To Record' button and a 'Close' button.

From the Product Database Manager you can take care of all aspects of your product data. The product database manager is made up of the following items:

**PRODUCT SEARCH:** The product search field lets you search for items in your database by just about any criteria you want.



To start the search set the drop down menu to the data field you want to search, set the operator drop down list, enter your search criteria and then start the search by hitting enter / return key while the cursor is in the search criteria field. Your search results will be show in the product list. The search will filter out items from the product list that do not match your search criteria so that only products that match your search criteria are shown. To clear the search results and restore the product list to show all the products click on the search reset button.

**PRODUCT LIST:** The product list shows either all the products in your product database or the result set of a product search. Selecting a product in the list will fill the data fields to the left of the list with the selected product's data.

**DATA FIELDS:** These are the product attributes that you can assign to a product entry. The data fields are populated with the data for the selected product in the product list. The picture button next to the picture field allow you to navigate to the product picture file.

**CONTROLS:** In the control section you can browse the product database sequentially with the data browser buttons and you can set the unit of measurement for the product data. The unit of measurement setting in the product database manager is independent from the unit of measurement setting for your planograms in the main program. If the two unit of measurement settings are not the same then PlanoGraphics will automatically convert the measurements from the product data on the fly to the unit of measurement you have chosen for your planogram. Since this conversion is done on the fly the measurements in your database are not permanently converted.

**CONTROL BUTTONS:** Use the control buttons to manipulate your data.

- Save Changes to Record : becomes enabled if you have changed any of the information in the data fields. To save any changes in the data fields you have to select the Save Changes to Record button.
- Import: Allow you to import, refresh or batch delete data to your database from a tab delimited text file.
- Delete: will delete the currently selected record.
- Export: will export your database to a tab delimited text file.
- Add New Record: will let you add a single product record to your product database.

## 3.2 Making Product Databases

Before you can start making planograms in PlanoGraphics you have to have build or import a product database. In PlanoGraphics you add product data in one of two ways:

1. Enter the product data manually for each product.
2. Import existing data from a tab delimited text file.

The PlanoGraphics database file is a proprietary file format which can only be opened by PlanoGraphics.

There is only one database file for the program. The database file can not be used from a network and has to be located in the same directory as the PlanoGraphics application folder.

Although there is no limit to the number of products you can have in a PlanoGraphics database file, there is a physical file size limit of 20GB. This is a limitation of the OS file system.

To make a new database start PlanoGraphics, select the EDIT PRODUCT DATABASE icon in the Welcome window or DATABASE >> NEW in the main menu. This will open the Product Database Manager.

The screenshot shows the Product Database Manager interface. It includes a search bar at the top left, a product list table, a detailed product form on the right, and control buttons at the bottom. Red boxes and arrows highlight specific features:

- Product Search:** Points to the search bar at the top left.
- Data for selected product in product list:** Points to the selected row in the product list table.
- Product List:** Points to the product list table.
- Controls:** Points to the data browser buttons and unit of measurement dropdown.
- Control Buttons:** Points to the Import, Delete, Export, Add New Record, and Close buttons.

Product	Description
stock nr	Description
20997	TRI-FOLD SAWS-618636 TRI-FOLD W/...
21073	LX GOLD BLD
33212	LEADER BITS-LL2
30808	KITS-H/S KIT 60
20223	LENEX EDGE-EDG100D BIMETAL UTILI...
224HE	
33112	LEADER BITS-LL112 LEADER 1 1/8 29
33100	LEADER BITS-LL100 LEADER 1 25M...
418T	
33256	LX LL-LL256 65mm
33125	
20374	
33175	
33150	
30887	
424T	
23834	CT HOLE CUTTER-17CHC 27MM
30886	VARI-BITS-VB-6 VARIBIT 1/PK
30001	ACCESSORIES-1L ARBOR BOXED-1L
20299	JIG SAW-CF320SC 3 X 3/16X20 5/CA...
20116	HACKSAW-V218HE 12 X1/2X023X18 1
20143	HACKSAW-V214HE 12 X1/2X023X14 ...
20306	JIG SAW-BT410S 4 X1/2X3/8X050X10 2...
20305	JIG SAW-BT406S 4
30211	CT H/S-11CT 1
30232	CT H/S-32CT 2
20556	RECIPS-676RC 6X7/16X050X6 5/PK...
20183	LX LRB 25PK 12110R 300mm 10TPI
20981	PVC BLADES-18" REPLACEMENT BL
20482	E-RECIP-110ER 11 3/4X1X035X10/14 ...

**Product Number:** 33112  
**Description:** LEADER BITS-LL112 L  
**Picture:** 33112 205X70.tif  
**Width:** 7,0  
**Height:** 20,5  
**Depth:** 0,0  
**EAN / UPC:**  
**Cost Price:** 0,00  
**Retail Price:** 0,00  
**Brand:** Lenox  
**Category:**

**Controls:** Data browser button, Unit Of Measurement: cm  
**Control Buttons:** Save Changes To Record, Import, Delete, Export, Add New Record, Close

The 3 required product attributes (or data fields) for a product entry are **Product/Part Nr**, **Width** and **Height**, where Product/Part Nr is any unique name or part number that identifies the product. It is important that Product/Part Nr is unique for each product entry. Width and Height are the measurements of the product in either centimeters or inches. You can enter measurements up to the nearest 0.25 cm / 0.1 inch (i.e. 2.25cm, 2.75cm, 1.2", 1.4", etc.). It is very important that you select the correct unit of measurement before you start to make your catalog. If you do not your pictures and the amount of space they take up on your display will not appear as you intended them to when you make your display.

The product data fields in the product database are:

**Depth** - The depth of the product.

**Description** - This can be any text description about the product or product entry.

**Picture** - This is the picture file name of the product. Pictures are not stored directly in your catalog file but rather a reference or link of where the picture file is located. The picture name attribute is the file name without the file path. Pictures have to be stored in the folder called "Catalogs" in the PlanoGraphics application folder.

**Category** - This can be any text description to place the product in a certain category. This information can then be displayed in your planograms using the TAGs feature or is used to generate automatic colors for product placement boxes.

**EAN / UPC** - EAN or UPS number

**Brand** - This can be any text description to place the product in a certain brand category. This information can then be displayed in your planograms using the TAGs feature or is used to generate automatic colors for product placement boxes.

**Cost Price:** The cost price of the product. This number is used to calculate profit reports.


**Retail Price:** The retail price of the product. This number is used to calculate profit reports.

### 3.3 Adding Products to your database

To add products to your database open the Product Database Manager and then do one of the following:

1. Enter the product data manually for each product.
2. Import existing data from a tab delimited text file.

To enter products one at a time to the database click on the ADD NEW RECORD button. This will open the new record dialog box. Fill in the new record form and then click on OK.

To import product data select the Import Button. See Importing Data  for more information.

### 3.4 Importing Data

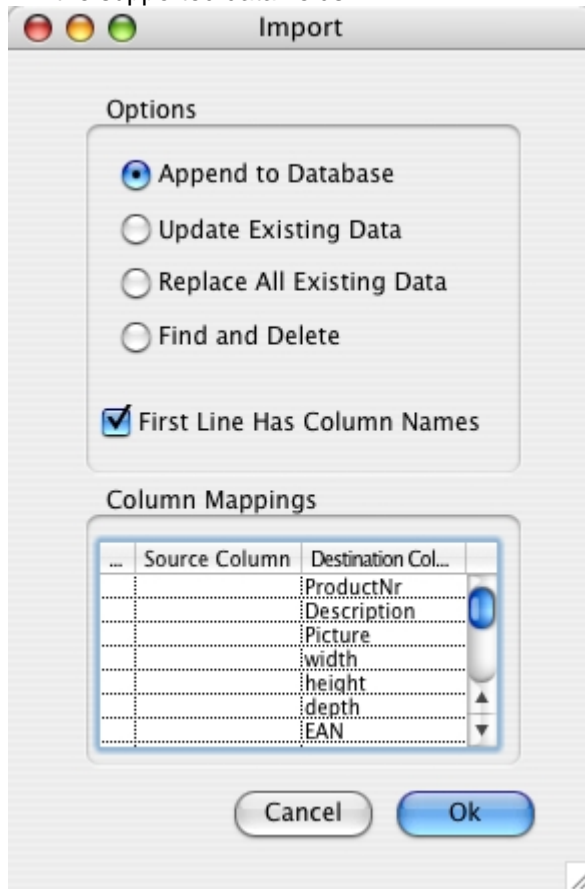
In many cases you will have some or all of your product information already available in a spreadsheet or database. Instead of having to re-enter all this information by hand in the PlanoGraphics catalog manager you can import the data from your preexisting spreadsheet or database in the form of a tab delimited text file.

Unlike other planogramming software, PlanoGraphics does not require you to arrange your data source's columns to match those of PlanoGraphics default columns. Instead PlanoGraphics uses the exact same column arrangement as your imported data.

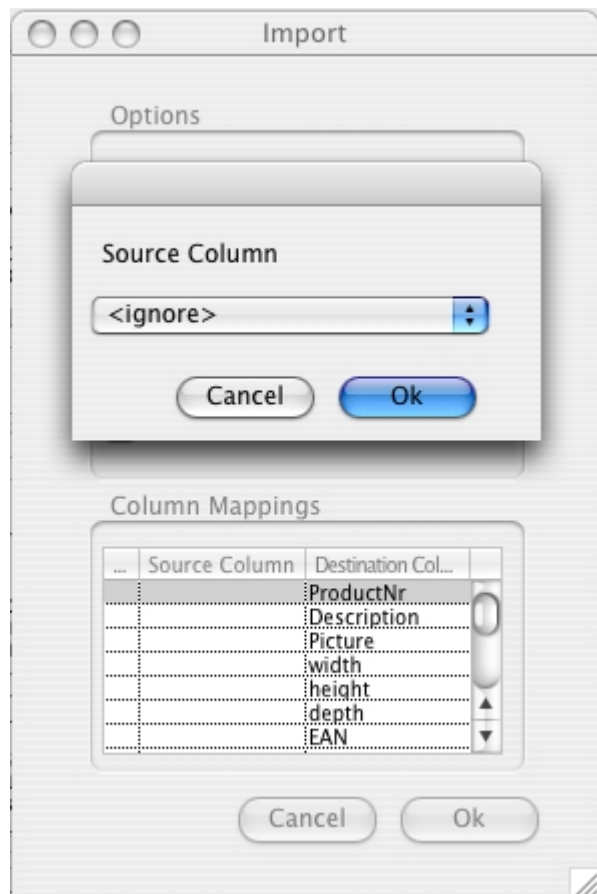
After you have imported your data by clicking on the IMPORT button in the Product Database manager or DATABASE >> IMPORT in the main menu, you map the columns in your imported data to the different types of required catalog information, such as Part No, Width, Height and Picture Name.

To Import:

1. Click on the IMPORT button in the Product Database manager or DATABASE >> IMPORT in the main menu.
2. Select the tab delimited text file you want to import.
3. Select the import option (explained below) and then map the data columns in your text file to the supported data fields



and click on OK. To map your data columns select the Destination column name to map in the Column Mappings list. This will open the mapper dialog box for the selected destination column. In the drop down list select the column name from your imported data that should be mapped to the destination data. If you do not want to map any data to the selected destination column choose the <ignore> option. Repeat this for each destination column listed in the Column Mappings list.



The import options consist of the following:

1. Append to Database: This option will append the imported data to the end of the database file. The existing data will not be deleted, overwritten or changed.
2. Update Existing Data: This option will compare the imported data and the existing data and will update the existing data in your database with the information in the imported data. New data will not be added to the database and no records are deleted.
3. Replace All Existing Data: This will delete all existing data in the product database and then add the imported data.
4. Find and Delete: This option will delete any records in your database that can be matched to the import data.

### 3.5 Linking Product Photos

To have pictures of your products appear in your planograms you have to fill in the picture field with the picture file name that corresponds to a product entry. If you do not provide a picture name in your database placement blocks will appear in your planograms instead of pictures.

To assign a picture to a catalog item click on the PICTURE button in the product database manager. When you select a picture the name of the picture and the file path information will be added to the picture field automatically. Pictures have to be stored in the folder called "Catalogs" in the PlanoGraphics application folder.

## 3.6 Rebuilding Product Database

The Rebuild Product Database function has two options:

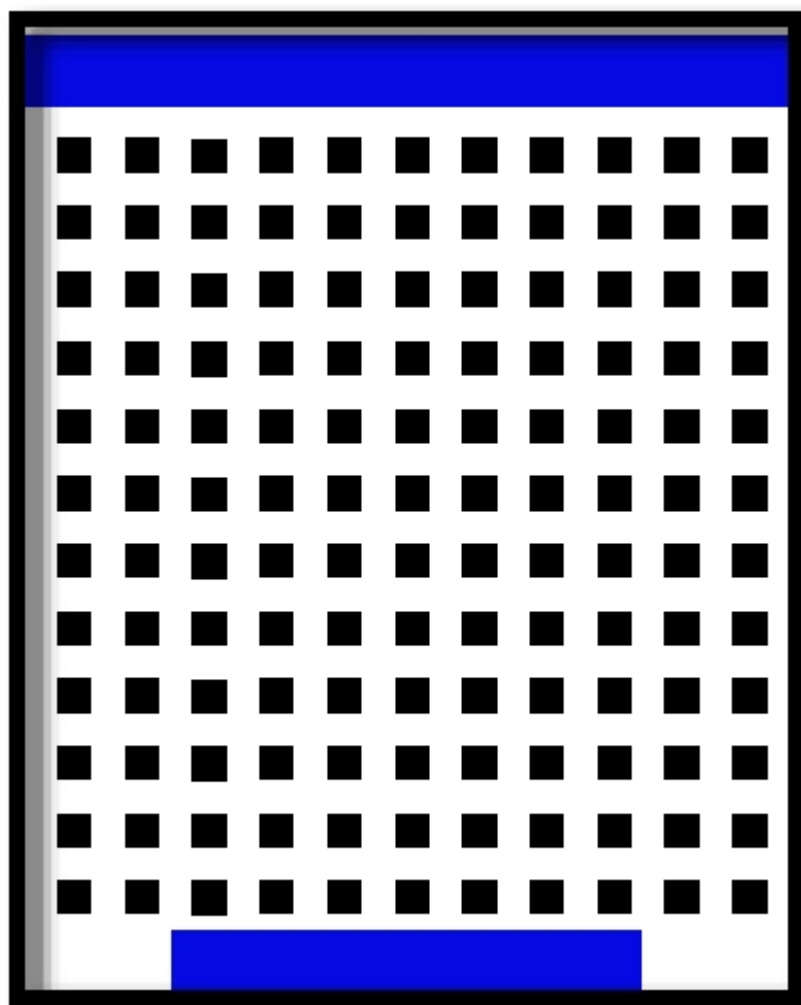
**Create New Empty Database File** - This option will delete your product database file and create a new empty database.

**Create New Product Database and Transfer Existing Data to New Database File -**

Rebuilding a product database may be needed in some rare cases as your database reaches the 20GB limit. For large databases that have a lot of data changes and deletions the database file may fill up with deleted record or records that are no longer used. The rebuild database function will permanently remove data from the database file, freeing up lost space in the file by creating a new database file and then transferring the data that is still in use from the old database file to the new database file.



# PlanoGraphics™ 3.5



Part

**IV**

Product Photos

## 4 Product Photos

### 4.1 Overview

PlanoGraphics does not requires you to preprocess images before using them in your planogram displays.

You may still however want to edit your product pictures to get better looking results or to get better program performance. You will need to use an image editing software package like Photoshop to edit your images. The kind of operations that you will need to do to improve your images include:

#### **Cropping**

#### **Background removal / Adding Transparent Backgrounds**

These are discussed in further sections.

### 4.2 Cropping

Cropping is the process of cutting out excess picture area around your product. It is important to remove all excess areas of your product images to make the product display at the right size in your planogram.

### 4.3 Background removal / Adding Transparent Backgrounds

For products that are non-rectangular and where it is important to see through areas that can not be cropped away, you can designate background areas of the image to be transparent by making them pure white (hex value FFFFFFFF or RGB value 255, 255, 25).

You can toggle this feature on and off for all the products in your planogram by selecting VIEW >> PICTURE TRANSPARANCY >> On / Off

### 4.4 Supported Product Picture File Formats

Product images can be in any file format supported by your installed version of Quick Time. The supported file formats can include as a minimum:

Standard Windows bitmap images (\*.bmp, \*.rle, \*.dib),

JPEG images (\*.jpg), Baseline, Progressive

TIFF images (\*.tif; \*.tiff), extended base line implementation

Photoshop images (\*.psd, \*.pdd)

Portable network graphic images (\*.png)

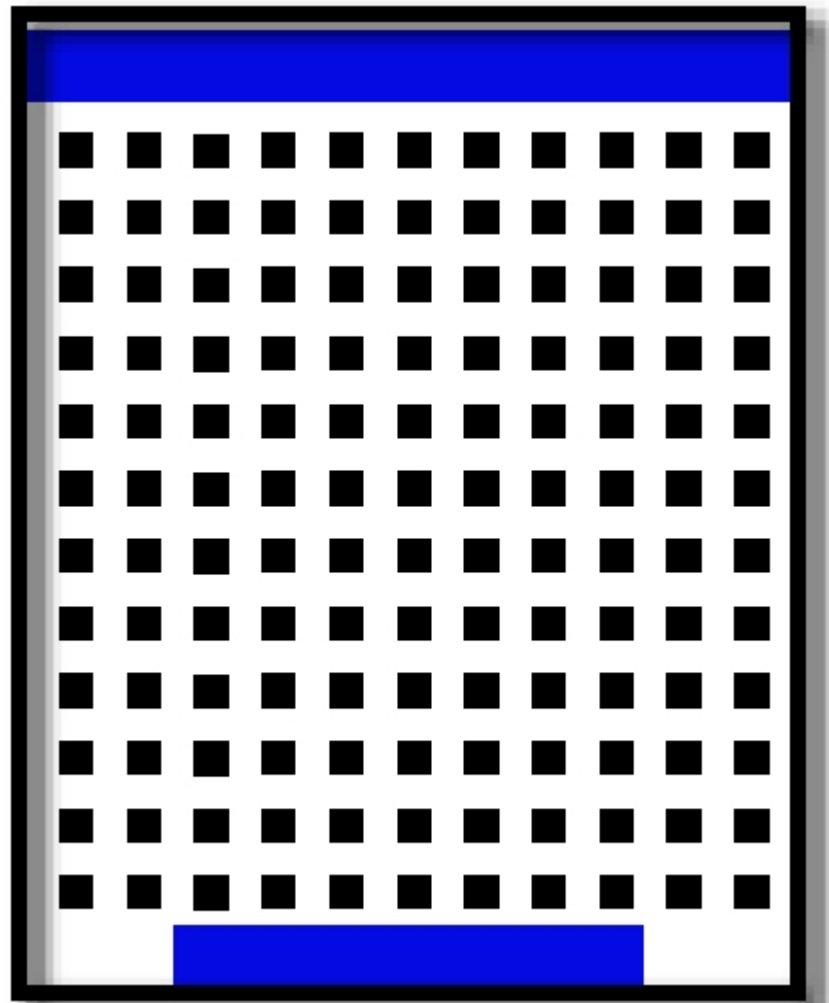
PIC

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Most newer versions of Quick Time support many more file formats. Check your Quick Time help files for more details.



# PlanoGraphics™ 3.5



Part

**V**

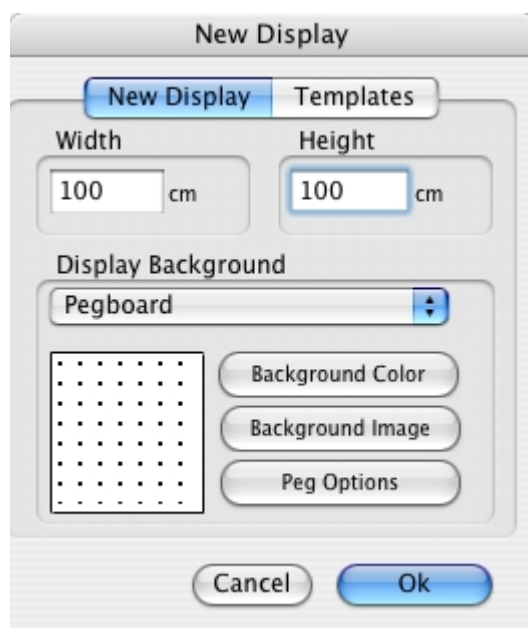
Making Planograms

## 5 Making Planograms

### 5.1 Setting Up Your Planogram

After you have made your catalog and linked your pictures to the catalog you are ready to make your planograms.

Clicking on FILE>>NEW will present you with the following display options;



**Wall width-** Width of the display in the currently selected unit of measurement. You can select from preset measurements or select a custom measurement. To change preset values just click on the number and type a new value.

**Wall Height-** Height of the display in the currently selected unit of measurement. You can select from preset measurements or select a custom measurement. To change preset values just click on the number and type a new value.

#### Wall Backgrounds:

**Pegboard** – when the pegboard background is used peg holes are drawn to the display background and products that have defined pegboard hanger holes (Peg X and Peg Y values greater than 0 in the product catalog) will be aligned to the nearest pegboard whenever they are added to a display or moved in the display.

**Solid** – solid is a background with a solid colored background. The color can be changed by clicking on the background color button.

**Slatwall** - when the Slatwall background is used horizontal slats are drawn on the display background and products that have defined pegboard hanger holes (Peg X and Peg Y values greater than 0 in the product catalog) will be aligned to the nearest slat whenever they are added to a display or moved in the display.

**Image** – the image background option allows you to make a composite picture of a display area. By combining a picture of a store display area or shelf as the background and photos of the items in your catalog you can create a photo realistic snapshot of any display area. See the section on "Using Images as Backgrounds" for more information.

Clicking on "OK" will create a blank wall display based on your these settings. The next step is to start adding products to your display.

Further options for changing the pegboard or slat wall can be found under EDIT >> OPTIONS in the main menu. In the options dialog box select the Peg Hole Options tab. These Peg Hole Options include:

**First peg from top and bottom** - The distance from the top edge of your display wall where the first row of peg holes starts

**First peg from the left and right** - The distance from the left or right edge of your display wall where the first and last peg hole columns start.

**Vertical peg space** - This is the space between each peg hole on each row.

**Horizontal peg space** - This is the space between each peg hole on each column.

**Peg hole size** - This is the diameter of the peg hole on your display wall.

**Peg hook depth** - This is the default peg hook depth applied to each product when it is added to your planogram.

Option	Value	Unit
First peg from left	4	cm
First peg from top	4	cm
First peg from right	4	cm
First peg from bottom	4	cm
Vertical peg space	4	cm
Horizontal peg space	4	cm
Peg hole size	.25	cm
Peg hook depth	13	cm

## 5.2 Using Images as Backgrounds

Making simulated in-store photos of your products is a snap in PlanoGraphics. To increase the realism of a simulated in-store photo using the image background feature it is important to follow some simple guidelines when taking your background pictures and when setting up a new PlanoGraphics document.

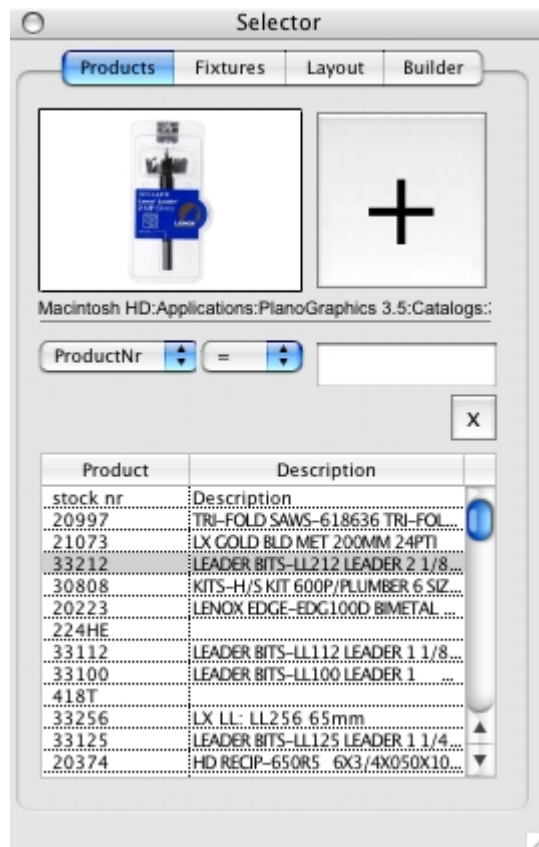
- 1) Compose items in the background picture using the same angle as your product pictures.
- 2) Use some existing items in you picture area or place items like tape markers in the actual physical picture area that can be used later as crop marks, two horizontal and two vertical. In these examples we could use the display itself as for the crop marks or we could use some chairs if we wanted to include some more of the display background.
- 3) With a ruler or tape measure, the physical distance before taking the picture between the horizontal crop marks and write it down. Repeat this for the vertical crop marks. In this example the width between the chair arms that serve as our horizontal crop marks measured out to 50cm and the height of the display which serves as our vertical crop marks measures out to 137cm.
- 4) Take the picture of your display area making sure the crop marks are included in the picture.
- 5) In the picture editor or another photo editing program crop the image at the crop marks in the picture.
- 6) Save the file. Include the actual physical measurements you wrote down earlier as the first part of the file name in the format "WidthxHeight DISPLAY NAME.ext". In this example the file name was saved as "50x137 Multi Display.jpg". When you save your file this way you will be able to easily see what measurements you need to enter when you select the image in the Document Setup dialog box.
- 7) Create a new document in PlanoGraphics.
- 8) Select Image as the background type.
- 9) Select the image you just saved, when prompted.
- 11) Start adding products.

## 5.3 Using the Selector

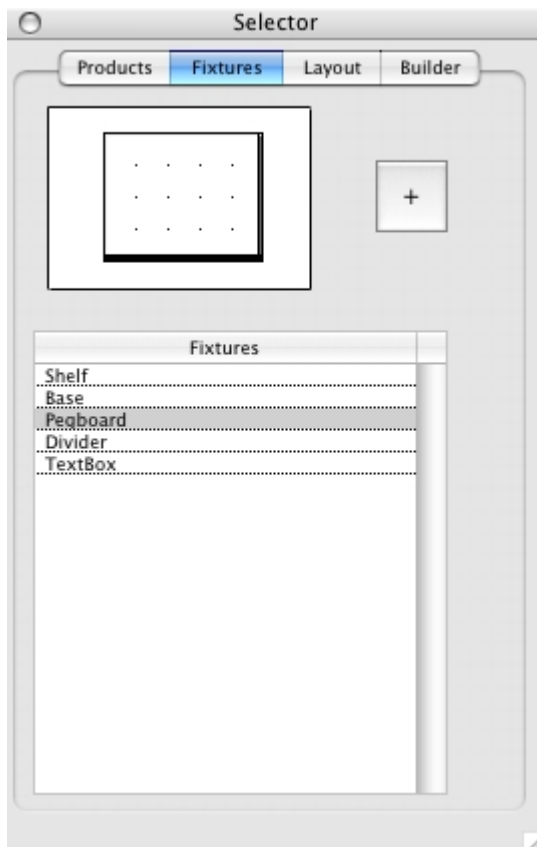
The selector gives you a quick, organized overview of your product database, display layout, fixture items and automated planogram builder options. The selector organizes the different information in lists and presents them under three categories. The selector has four tabbed lists called PRODUCTS, FIXTURES, LAYOUT and BUILDER

PRODUCTS – lists all the products in your catalog in a small grid much like the catalog manager. Above the grid is a product preview display for the selected catalog. If a product picture can not be found or has not been linked yet you can still add the item to your display. A colored placement box will be added to your display showing you how much space the product will take up. To add the selected product click on the + button.

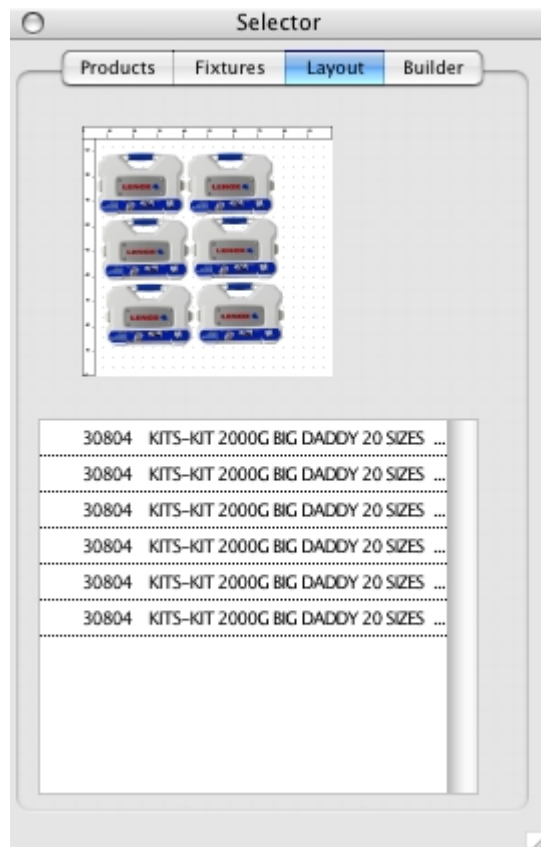




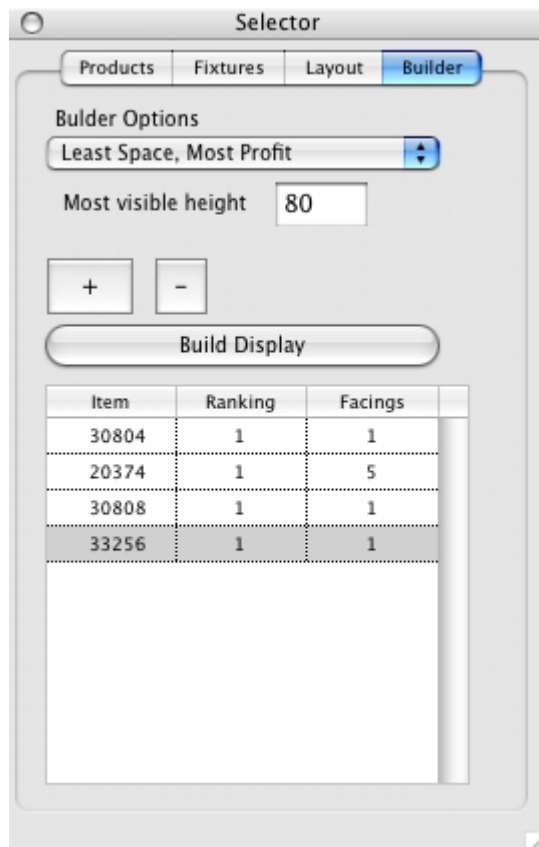
**FIXTURES-** From this tab you can add or modify any kind of fixture to your planogram by selecting the fixture.



LAYOUT- lists of all the items that you have added to your display. Above the list is a preview picture area that show a your complete display layout.

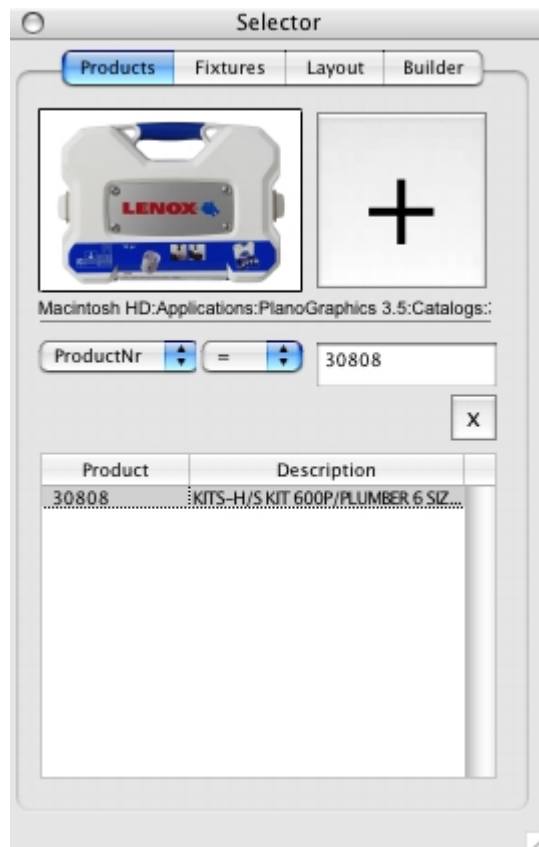


**BUILDER** – Displays planogram builder items and options. See the section "Automated Planogramming [41]" for more details.



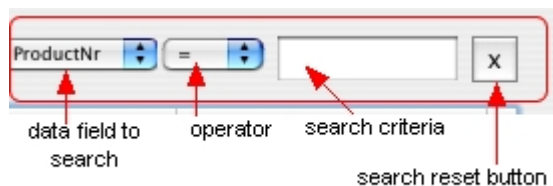
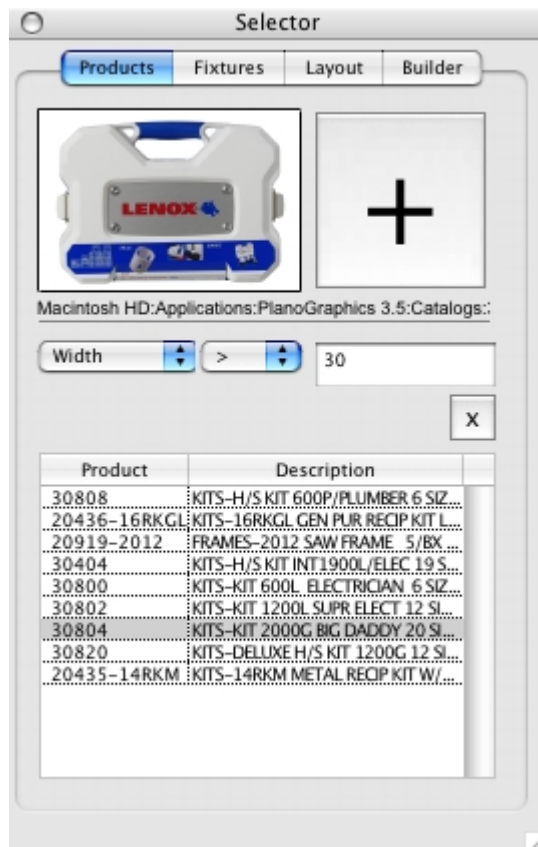
## 5.4 Searching for Products

To search for a product in your product database use the search field under the Products tab in the Selector.



The product search field lets you search for items in your database by just about any criteria you want. The above picture shows a product search for a product entry with a product number 30808.

In the example below a search is done for all products that have a width greater than 30.



To start the search set the drop down menu to the data field you want to search, set the operator drop down list, enter your search criteria and then start the search by hitting enter / return key while the cursor is in the search criteria field. Your search results will be show in the product list. The search will filter out items from the product list that do not match your search criteria so that only products that match your search criteria are shown. To clear the search results and restore the product list to show all the products click on the search reset button.

## 5.5 Manual Planogramming

To add items manually to your display you find the item you want in the Selector (see searching for products [38](#)) and click on the + BUTTON in the selector.

When you add an item to your display it becomes the "selected item" in your display and this is designated by a "focus rectangle" being drawn around the item. If you leave this item selected and then add another item to your display PlanoGraphics will add the new item to the next available peg to the right of the product on the same peg row. The new item will be added on the

right hand side and as closely as possible to the selected item. As soon as the new item is added to the display it becomes the "selected item". You can continue this process to quickly add a whole row of nicely aligned and evenly spaced items to your display. When the row of items you add reaches the end of the display wall PlanoGraphics will wrap and around to start a new row of products.

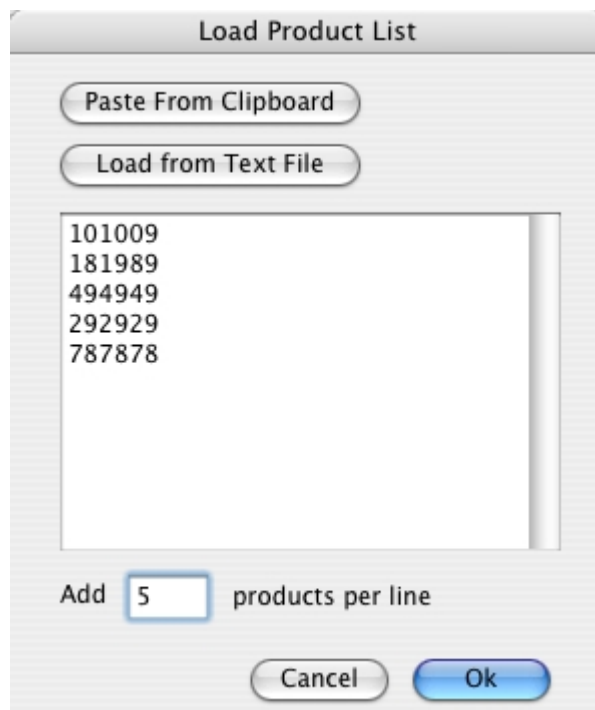
If you don't want PlanoGraphics to align items like this then just deselect your selected item by clicking any place on the wall display where there is no product, and then add the new item. When there is no selected item and you add a new item, the new item is always placed in the upper left corner of your display and it is not aligned to any peg holes when first added.

## 5.6 Loading Product Lists & Automated Planogramming

Automated planogramming with PlanoGraphics Builder Feature allows you to quickly try out different planogram display configurations based on placement criteria you select. PlanoGraphics analyzes information about the products you want in your planogram, ranks them based on this information and automatically builds a complete planogram in a matter of seconds, optimizing product placement to match your placement criteria.

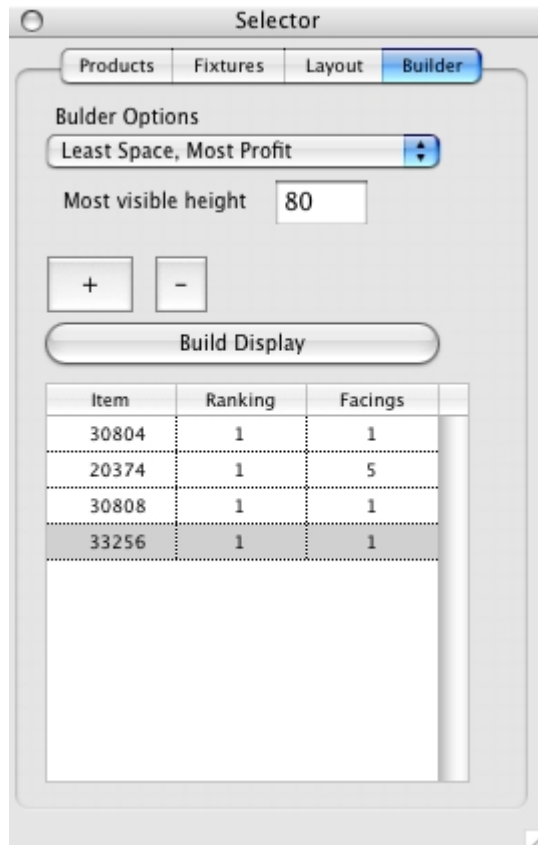
Building automated planograms is a three step process using the Load Product List command in the main menu .

- 1) Create a new planogram by selecting FILE >> NEW in the main menu.
- 2) Select FILE >> LOAD PRODUCT LIST in the main menu and select a text file that contains a list of products .
- 3) Paste or load a text file to the product list or enter the product numbers manually to the product list. Set the Load Product List Options. These options let you tell PlanoGraphics how many products should be added for each product listed in the product list. After setting the options select OK.



NOTES: The text file containing the product list can be created in TextEdit or any word processor. The text file should contain only the product part number. Each product number should be on its own line in the text file. Each time you load a product list from a text file any existing products that may be in your planogram are deleted before a new planogram is built based on the product list.

After the planogram is created you can manually adjust the position of products in your planogram or you can have the whole planogram automatically rebuilt by changing the Ranking Options (discussed in more detail below) or other options under the Builder Tab in the Selector and then clicking on the Build Display button. You do not need to reload the product list text file.



You can also manually add products to the builder list. This is a six-step process using the Selector.

1) Create a new planogram by selecting FILE >> NEW in the main menu.

2) Select or load the products you want to have in your planogram.

Click on the PRODUCTS tab on the selector, select a product.

Click back on the BUILDER tab on the selector, and click on the + button.

3) Set the builder placement option.

Select the BUILDER tab, then select one of the items in the Placement Options drop down list. The different placement options include;



Manual Ranking - Adds products to your display in the same order as they appear in the Builder List

Least Space, Most Profit – Finds the products in the builder list that take up the least space and have the greatest profit margin and places these items in the most visible part of your display.

Most Space, Least Profit – Finds the products in the builder list that take up the most space and have the lowest profit margin and places these items in the most visible part of your display.

Most Profitable - Finds the products in the builder list that have the greatest profit margin and places these items in the most visible part of your display.

Least Profitable - Finds the products in the builder list that have the lowest profit margin and places these items in the most visible part of your display.

Large to Small - Finds the products in the builder list with the greatest volume and places these items in the most visible part of your display.

Small to Large- Finds the products in the builder with the least volume and places these items in the most visible part of your display.

Wide to Thin- Finds the products in the builder with the greatest width and places these items in the most visible part of your display.

Thin to Wide- Finds the products in the builder with the least width and places these items in the most visible part of your display.

Tall to Short- Finds the products in the builder with the greatest height and places these items in the most visible part of your display.

Short to Tall- Finds the products in the builder with the lowest height and places these items in the most visible part of your display.

4)Set the most visible height and automatic shelf.

Most visible height is the part of your display that customers are most likely to see and is usually set to the customers eye level. Set this value by clicking on the Most Visible Height button.

5)Set the number of facings for each item.

The number of facings is the number of times the product is consecutively placed in the display. To change click the cell in the Facings column for any given product in the builder list.

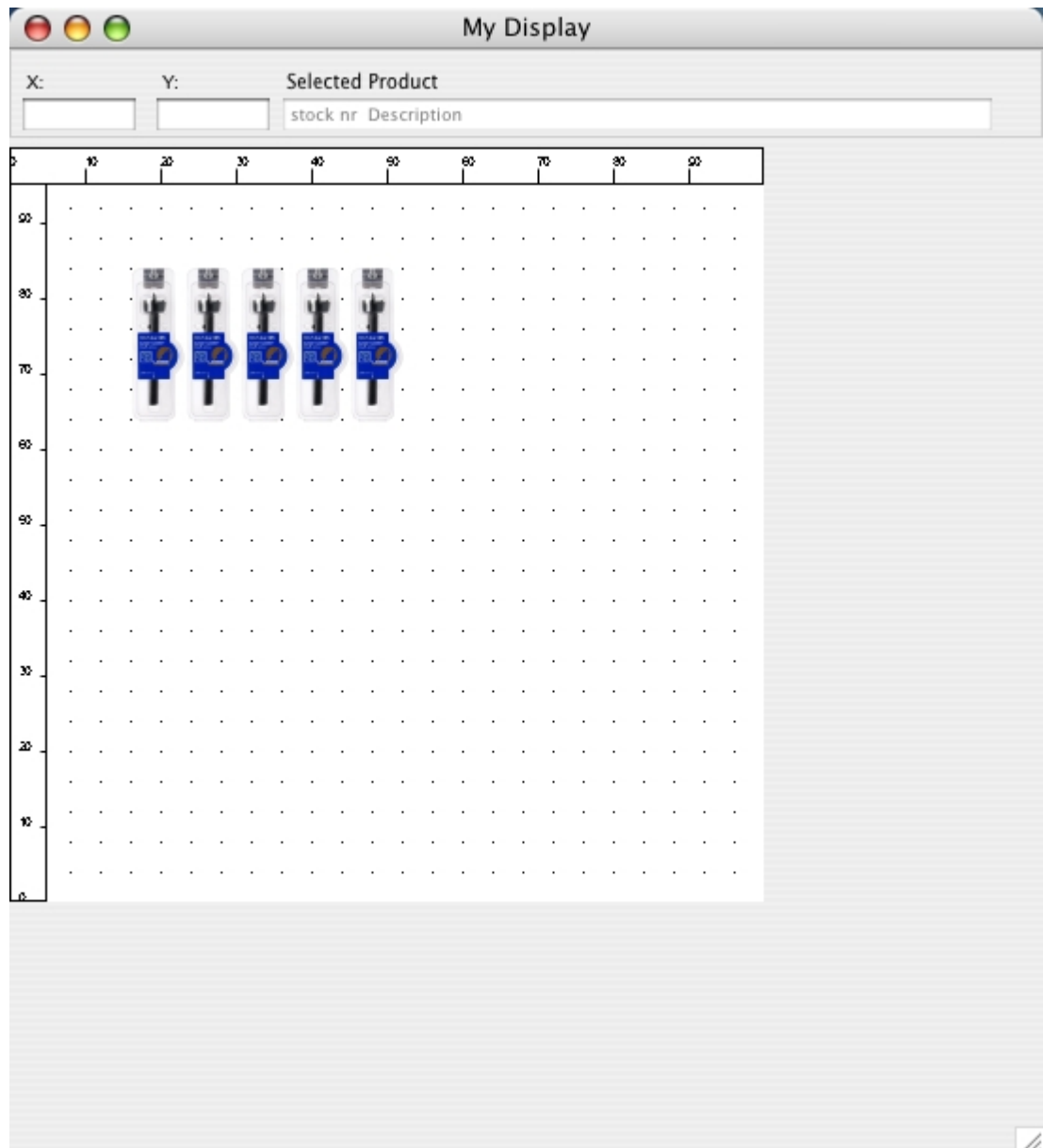
6)Click on the "Build Display" button.

The build display button deletes any items you may have in the display and then builds your display based on your builder options.

## 5.7 Fine Placement: nudging and numeric placement

To do fine product placement and nudging you can nudge a selected product or a group of products by using the arrow keys.

To numerically place or move an item or a group of items in your planogram enter the new value in the X, Y panel in the upper part of the main program window.



For example, if you would like to move a selected product in your planogram so that the left edge of the product is 10 inches from the left edge of the planogram enter 10 after the x= and then the return key. To move an item 20 inches from the bottom of the planogram enter 20 after the y= and then hit the return key.

NOTES: Y values are measured from the bottom of the planogram to the top edge of the planogram. X values are measured from the left edge of the planogram to the left edge of the product. When moving or placing a group of products the X value is always the most left edge of the group and not the selected product. The Y value is always the most top edge of the group.

## 5.8 Peg Hook Depth

By default all new items added to your display take the hook depth that you assigned in the OPTIONS dialog box. If you want to change this value for an item that you have already added to your planogram, click on PRODUCT >> PRODUCT DETAILS. In the Product Details dialog

change the Peg Hook Depth value and click OK. The Stack Count value will automatically recalculate to reflect the new hook depth the next time you open the Product Details dialog.

Details dialog change the Peg Hook Depth value and click OK. The Stack Count value will automatically recalculate to reflect the new hook depth the next time you open the Product Details dialog.

## 5.9 Saving your planogram

When you are done making your product display you can save it just like any other document based program by clicking on FILE>>SAVE.

You can save your product display in two formats, as a document or as stationary / template. To save a document as stationary, just save it in the Stationary sub folder under the programs main installation folder. All documents saved in the Stationery sub folder will appear in the Stationery tab in the New Document setup dialog that appears when you click on FILE>> NEW in the main menu. Using stationery allows you to create a new document based on a saved file. The new document inherits all the product and fixtures in the Stationery document which can save you lots of time if you need to create several planograms based on a standard planogram layout.

## 5.10 Displaying Product Information with TAGS

TAGS are small text boxes that are automatically grouped with an item when it is added to your display. The difference between a text box and TAGS is that the information on the TAG is filled out and updated automatically. The kind of information you can choose to have displayed in tags include:

PLACEMENT ORDER,  
PRODUCT PART NO  
THE X &Y COORDINATE  
PRODUCT STACK DEPTH.  
CATEGORY  
BRAND  
CUSTOM TEXT

The X coordinate is the distance from the left edge of the display area to the left edge of the product. The Y coordinate is the distance from the bottom of the display to the top edge of the product. You can use these coordinates when setting up a real display. To show or remove TAGS click on VIEW >> TAGS and then select the tag type you want to show.

To enter text to the Custom Text select an item in your planogram and then select to VIEW >> TAGS >> ENTER CUSTOM TEXT. To clear custom text from an item, select the item and then select VIEW >> TAGS >> ENTER CUSTOM TEXT. When the input box appears clear the text in the editable part of the input box and then click on the OK button.

NOTES: If you turn off the Custom Text Tag, the custom text for each item is not deleted. It is saved with the planogram and simply becomes invisible until you turn the Custom Text Tag on again. The Category and Brand Tags will only show information if the Category and or Brand information is filled in for the selected product.

## 5.11 Display Modes

By default PlanoGraphics displays your product pictures when there is one available and a placement box when a picture is not available. You can override this so that only placement boxes are displayed regardless of the availability of a product picture. Placement boxes may be desired for increased performance on slower computers or when working with large picture files. This setting is applied to printing and exporting as well as screen how products are displayed on the screen. Image backgrounds are always displayed as an image regardless of this setting. To change the display modes click on VIEW>>MODE.

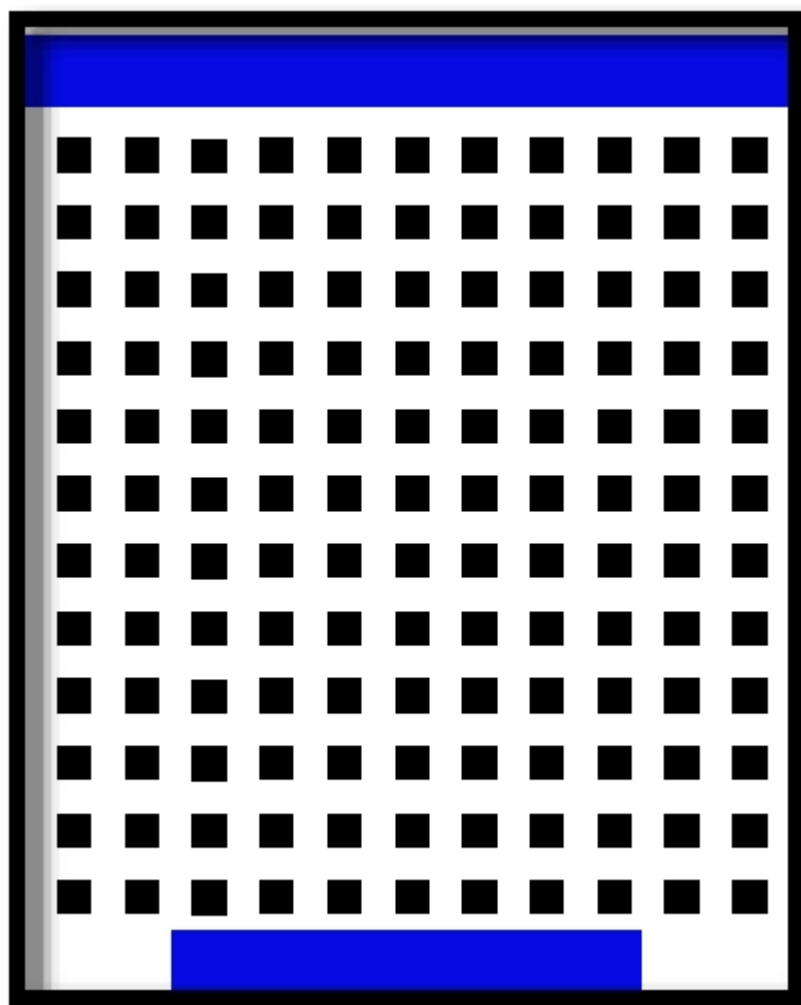
By default placement boxes are colored automatically based on the product's size. Placement boxes can also be colored automatically based on Category and Brand. Color options can also be turned off so that placement boxes are black and white wire frames or you can manually set the color for each placement box. To change how placement boxes look select:

VIEW >> MODE >> PLACEMENT BOX >> (and then one of the following options)

- 1) Color by Size.
- 2) Color by Category - This option requires that you have a "Category" column defined in your catalog file or database and that it is filled in for each product.
- 3) Color by Brand - This option requires that you have a "Brand" column defined in your catalog file or database and that it is filled in for each product.
- 4) All White - This creates white placement boxes with a black frame.
- 5) Set Manual Color - This allows you to assign a custom color for a selected item in your planogram.
- 6) Clear Manual Color - This clears the manual color for a selected item and assigns the currently selected automatic color.
- 7) Clear All Manual Colors - This clears all the manual colors for all the items in your planogram and assigns the currently selected automatic color.

NOTE: When you assign a manual color to an item the color for the item is locked and will not change even when the automatic color option is changed. The only way to unlock the manual color is to select the Clear Manual Color or the Clear All Manual Colors. The manual color options are also accessible through the context menu (right mouse click on a product in your planogram).

# PlanoGraphics™ 3.5



Part  
**VI**

Reports

## 6 Reports

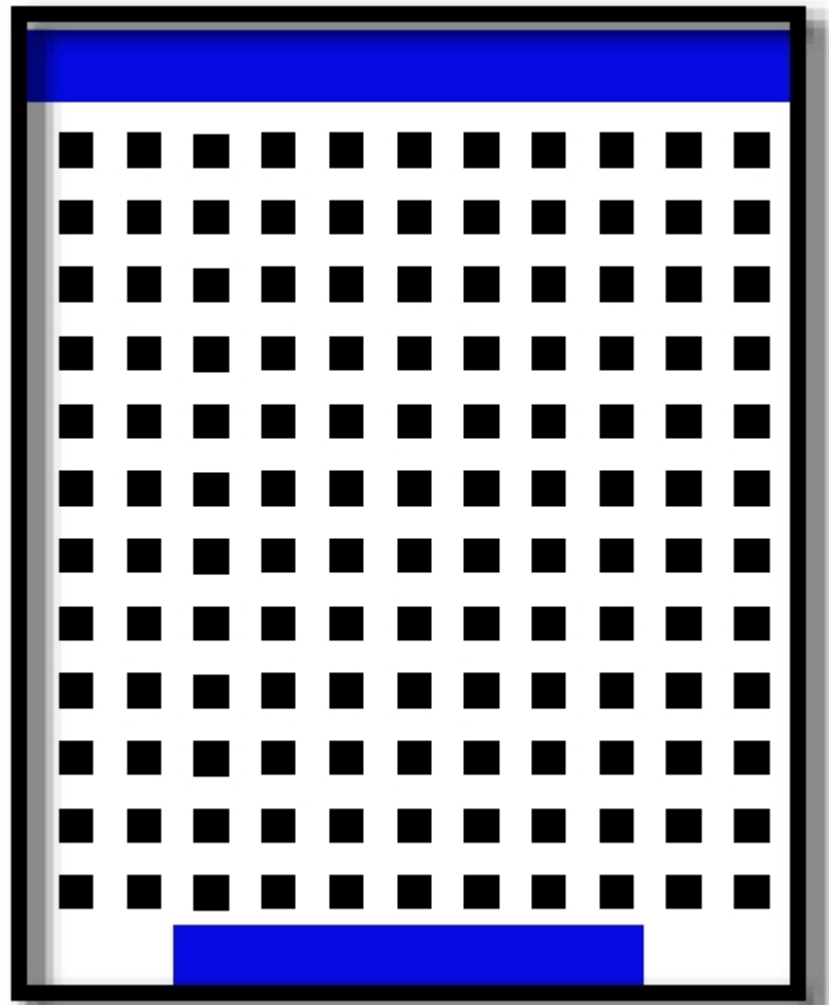
### 6.1 Overview

PlanoGraphics Quick Reports report writer allows you to create the following reports:

1. Product Listing
2. Investment and Profit
3. Space Usage
4. Product Depth Count

To make reports click on VIEW >> REPORT. After your report has been generated you can edit the report text, save the report or print it.

# PlanoGraphics™ 3.5



Part

**VII**

Publishing Planograms

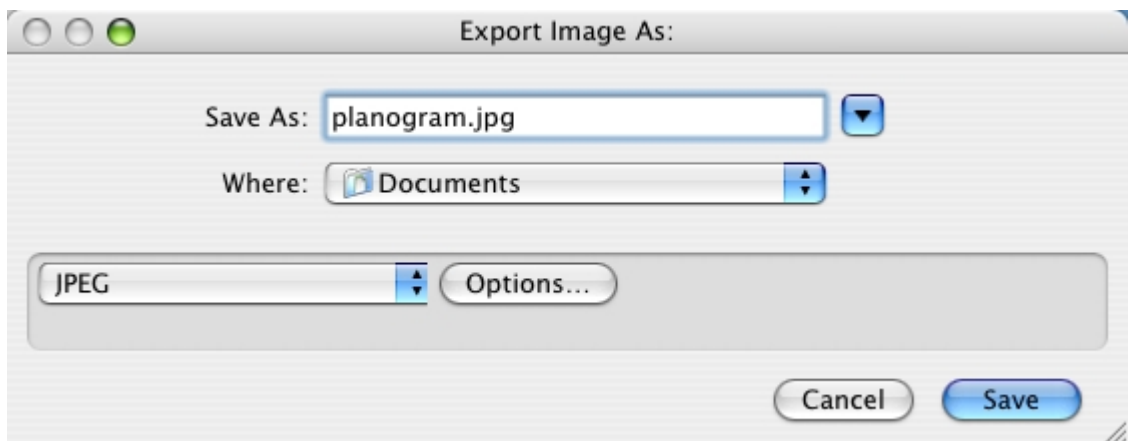
## 7 Publishing Planograms

### 7.1 Overview

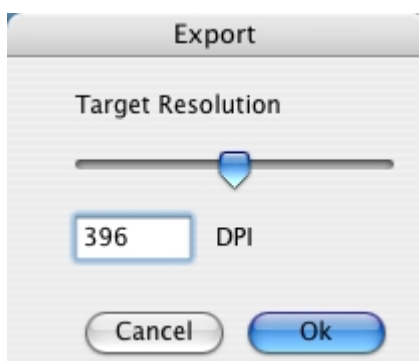
To share your planogram with others you can export your planogram to a variety of picture file formats, you can print your planogram, or you can have PlanoGraphics build a complete web site based on your display.

### 7.2 Exporting

You can export your planogram to a variety of picture file formats. Exporting to a picture file format more or less makes a "snap shot" of your planogram. You can view an exact copy of your planogram but it can not be changed or edited. Supported file formats include BMP, TIFF, Targa and JPEG and any other file format supported by your installed version of Quick Time.



In addition you can also choose a target resolution of between 72 dpi and 600 dpi for your exported planogram.



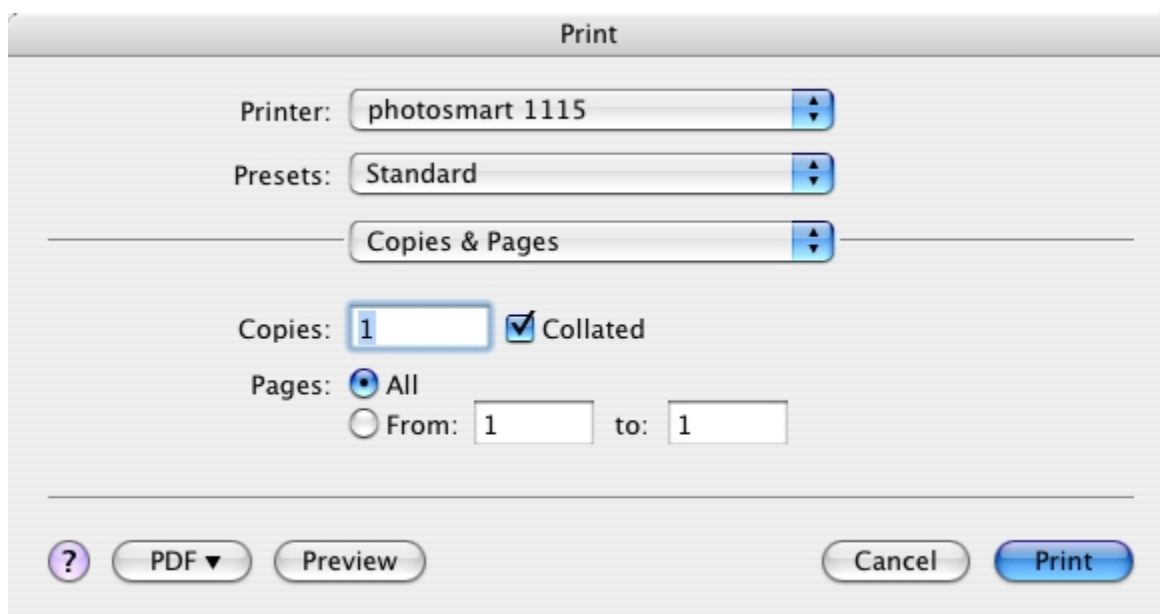


## 7.3 Making Adobe Acrobat PDF files

Adobe® Portable Document Format (PDF) is the de facto open standard for electronic document distribution worldwide. Adobe PDF is a universal file format that preserves all the fonts, formatting, graphics, and color of any source document, regardless of the application and platform used to create it. Adobe PDF files are compact and can be shared, viewed, navigated, and printed exactly as intended by anyone with free [Adobe Acrobat® Reader®](#) software.

When running on MAC OS X, PlanoGraphics allows you to output your planograms to a PDF file without the need for post processing or the need for Adobe Acrobat or Adobe Distiller\*. In addition you can encrypt and compress PDF files created with PlanoGraphics for secure and easy transmission over the Internet.

To create a PDF file click on FILE >> PRINT. In the Print dialog box select the PDF or SAVE AS PDF button.

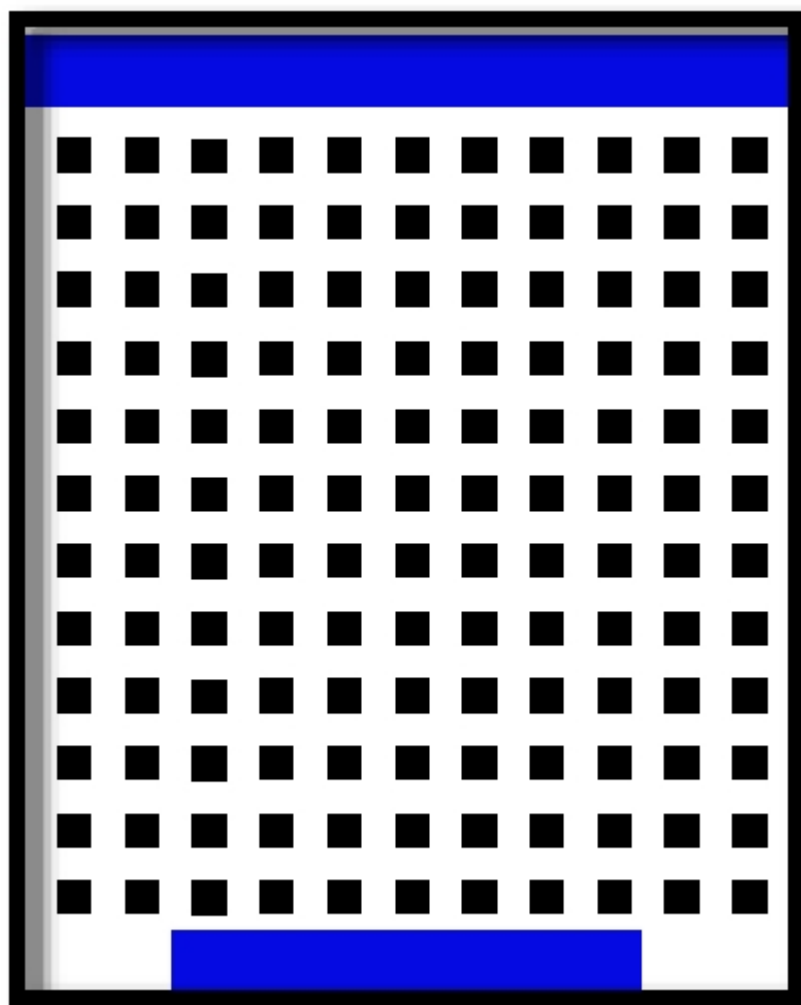


## 7.4 Printing

You can print to any printer supported by the MAC OS. Select FILE>>PRINT. PlanoGraphics will automatically calculate the maximum printing resolution, paper orientation and scaling to maximize usage of the printable area of the paper at the best possible print quality.



# PlanoGraphics™ 3.5



Part

**VIII**

Program Options

## 8 Program Options

### 8.1 Selecting Unit of Measurement

You can change the unit of measurement that PlanoGraphics uses to display a product's position and for reports selecting EDIT>>OPTIONS.

Units of measurement options include:

Centimeters

Inches

Peg hole position

When you select the Peg hole option, the peg hole number will be shown in the X Y coordinate box on the main document window. The X Y coordinate box will also accept peg hole entries when you want to numerically place a product on a particular peg hole. However for all other functions and calculations PlanoGraphics will use the last selected cm or inch setting.



This unit of measurement setting is independent from the product database manager's unit of measurement setting. If the two unit of measurement settings are not the same then PlanoGraphics will automatically convert the measurements from the product data on the fly to the unit of measurement you have chosen for your planogram. Since this conversion is done on the fly the measurements in your database are not permanently converted.

To change the unit of measurement for the products in your product database click on

DATABASE >> EDIT in the main menu.

This will open the product database manager. Change the unit of measurement in the controls part of the database manager and then click on the close button to save the changes. Changing this setting will not convert or change any of the measurements in your product database but rather the measurements will be read in as either inch or cm depending on the setting.

The screenshot shows the Product Database Manager interface. It includes a Product Search field at the top left, a Product List table in the center, and a Controls section at the bottom left. On the right side, there is a detailed view for the selected product (Product Number 33112, Description LEADER BITS-LL112 L). The Controls section includes a Unit Of Measurement dropdown set to 'cm'. The Control Buttons section includes buttons for Import, Delete, Export, Add New Record, and Close. Red boxes and arrows highlight these key areas.

**Product Search**

**Data for selected product in product list**

**Product List**

**Controls**

**Control Buttons**

Product	Description
stock nr	Description
20997	TRI-FOLD SAWS-618636 TRI-FOLD W/...
21073	LX GOLD BLD
33212	LEADER BITS-LL112 LEADER 1 1/8 29
30808	KITS-H/S KIT 60
20223	LENOX EDGE-EDG100D BIMETAL UTILI...
224HE	
33112	LEADER BITS-LL112 LEADER 1 1/8 29
33100	LEADER BITS-LL100 LEADER 1 25M...
418T	
33256	LX LL- LL256 65mm
33125	
20374	
33175	
33150	
30887	
424T	
23834	CT HOLE CUTTER-17CHC 27MM
30886	VARI-BITS-VB-6 VARIBIT 1/PK
30001	ACCESSORIES-1L ARBOR BOXED-1L
20299	JIG SAW-CF320SC 3 X 3/16X20 5/CA...
20116	HACKSAW-V218HE 12 X1/2X023X18 1...
20143	HACKSAW-V214HE 12 X1/2X023X14 1...
20306	JIG SAW-BT410S 4 1/2X3/8X050X10 2...
20305	JIG SAW-BT406S 4 1/2X3/8X050X10 2...
30211	CTH/S-11CT 1
30232	CTH/S-32CT 2
20556	RECIPS-676RC 6X7/16X050X 6 5/PK...
20183	LX LRB: 25PK 12110R 300mm 10TPI
20981	PVC BLADES-18" REPLACEMENT BL
20482	E-RECIP-110ER 11 3/4X1X035X10/14...

Product Number: 33112  
 Description: LEADER BITS-LL112 L  
 Picture: 33112 205X70.tif  
 Width: 7,0  
 Height: 20,5  
 Depth: 0,0  
 EAN / UPC:  
 Cost Price: 0,00  
 Retail Price: 0,00  
 Brand: Lenox  
 Category:

Save Changes To Record  
 Import Delete Export  
 Add New Record  
 Close

Data browser button  
 Unit Of Measurement: cm

## 8.2 Welcome Window

Welcomes you with planogram wizard when you first start the program. This option can be switched off in EDIT >>OPTIONS and then by deselecting the Welcome option.



### 8.3 Save Option

The save option selected PlanoGraphics will append the correct file extension when a planogram file. This is needed for the file to open correctly on the Windows version of PlanoGraphics



## 8.4 Open Option

With the Open Option selected, all file types will be enabled in the Open Dialog box when you open a planogram file. This option should only be used if you are using files from a Windows version of the software or if your planogram files lose their Mac creator code. This can happen whenever the file is stored or transferred on a system (like Windows) which does not support Macintosh resource forks.





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